



# STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**  
Liquor Purchasing Agent

**Job Code Title**  
Purchasing Agent

**Pay Band**  
05

**Job Code Number**  
131215

**Liquor Control Division**  
Liquor Distribution Unit

**Fair Labor Standards Act**  
Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Liquor Control Division administers the state's Alcoholic Beverage Code which governs the control, sale, and distribution of alcoholic beverages. The division provides customer service with a focus on public safety to ensure a safe, orderly, and regulated system for the convenient distribution and responsible consumption of alcoholic beverages. The Liquor Control Division includes the Administrative Team, Liquor Distribution Unit, and Liquor Licensing Bureau. The Liquor Distribution Bureau manages state wholesale liquor operations including warehouse shipping and receiving, accounts receivable and payable, inventory management, liquor order processing, agency contract management, and customer service.

## **Job Responsibilities**

The Liquor Purchasing Agent procures stock necessary to maintain an inventory of more than 3,000 distilled spirits and fortified wine products and ensures adequate inventory is available for retail customers. This includes responsibility for administering liquor distribution program operations and support services to facilitate and document liquor procurement, inventory management, and related activities. The position reports to the Liquor Distribution Unit Manager and does not supervise other staff.

### **• Procurement 70%**

1. Evaluates on-hand inventory levels to determine procurement needs using the warehouse management system to query products vendor-by-vendor. Determines the level of products on hand and sales histories. Evaluates product data to identify trends in product sales such as promotional offers, seasonal products or special orders.
2. Places and tracks sales orders with vendors to acquire distilled spirits and fortified wine products to meet retail needs in a cost-effective and compliant manner. Uses historical sales data to forecast inventory needs. Requests pricing information, prepares purchase orders, and enters product information into the warehouse system.
3. Determines and classifies products based on historical sales. Maintains current and accurate product categories and inventories. Determines appropriate taxation and pricing rates. Determines the type of product and appropriate formula to apply to calculate excise and licensing taxes.
4. Updates product specifications in the warehouse system including factors such as weight, which impacts the bill of lading; and cases per tier and pallet. Ensures that quantities ordered conform to product packaging and shipping provisions such as making sure the number of cases ordered conforms to the typical pallet size. Updates inventory systems with orders.

5. Identifies and communicates products that could be considered deceiving to underage consumers and communicates this to the unit manager. Obtains pictures of new items or links to product websites in order to view the packaging, labeling, and advertising associated with the product. Ensures only products approved by the department are made available to agency liquor stores.
  6. Records products received into the warehouse to ensure the proper goods were received according to the order and that inventory records are accurate and current. Inspects products received. Compares orders, shipments, and receipts to ensure accountability of all products. Enters products received into the GenTax system. Discusses defective or unacceptable goods and services with vendors and others to determine the source of problems and initiate appropriate corrective action.
  7. Researches new products via the internet and trade publications to identify products to meet retail customer needs within division guidelines and parameters for acceptable products. Establishes relationships with new vendors to obtain requested products and to respond to special requests.
  8. Generates product information correspondence for liquor store agents, liquor vendors, and other members of the liquor industry.
  9. Confers with vendors to obtain product information such as price, availability, and delivery schedule. Maintains product knowledge and awareness of liquor trends.
- **Distribution Coordination 25%**
    1. Updates and maintains product specifications within the warehouse management system.
    2. Updates, generates, and formats monthly price lists. Extracts information from the warehouse management system into a spreadsheet; manipulates and formats the data; and breaks the data down into various sections. Distributes price information using the website, email, and postal mail.
    3. Generates letters, reports and charts and performs other office duties.
    4. Maintains documentation of all purchases by compiling purchasing data into reports, logs and files.
    5. Runs queries and data extracts from the warehouse management system to provide data necessary for management decisions and program evaluation.
  - **Other Duties as Assigned 5%**
    1. Performs other duties as assigned by the supervisor.
    2. Covers for the supervisor or coworkers during absences.
    3. Coordinates special projects or events.
    4. Participating in quarterly inventories.
    5. Attends training and continuing education as required.

### **Job Requirements**

To perform successfully as a liquor purchasing agent, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in multi-tasking; paying attention to details and accuracy; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; compiling and analyzing data from multiple sources; foreseeing potential problems and determining the best course of action; following written and oral directions and instructions; and using word processing, spreadsheet, and database applications are required. Incumbent is required to exercise discretion and judgment in handling confidential and sensitive information.

This position requires knowledge of the principles and practices of business administration; procurement and purchasing methods and techniques; product specifications; business law; cost analysis; Montana procurement standards; department purchasing policies and procedures; office administration principles; inventory control; and technical writing.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in business administration or related field. No prior work experience is required.
  - Experience in sales forecasting and procurement is preferred.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

This position has considerable mental stress and pressure due to workload, deadlines, time constraints, and nature of contacts. At times, the incumbent will deal with angry and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use and being seated for extended periods of time. The incumbent may spend considerable time on the phone. Work hours may exceed 40 hours per week from time to time. Working in the liquor warehouse may involve hazardous, dusty, or noisy areas. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

### **Special requirements**

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Shauna Helfert, Division Administrator Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resource Director Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Name (print): \_\_\_\_\_